

State of California
Department of Community
Services and Development



REQUEST FOR APPLICATION (RFA)
RFA #: 2010-RFA-12

**For Providers of Weatherization Services to the
Low-Income Communities through the
American Recovery and Reinvestment Act of 2009**

December 2010

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A Message to Potential Bidders:

The California Department of Community Services and Development (CSD) is offering your organization a chance to compete in a one time opportunity to greatly expand the energy efficiency of the homes and multi-family dwellings of low -income families. The federally funded weatherization project contained in this solicitation will bring new and expanded job growth and benefits to low- income communities lasting for years to come, and will measurably improve California's overall energy efficiency.

With the recent introduction of the American Recovery and Reinvestment Act of 2009 (known as ARRA or the "Recovery Act") much focus—and funding—has been directed toward home weatherization. The Department of Community Services & Development (CSD) hopes that the combination of ARRA funding and the release of this solicitation will generate a great deal of interest. The purpose of this Request for Application (RFA) is to bring ARRA weatherization funding to areas that are not being fully served through the CSD initial awards for ARRA services to the existing program network.

Our hope is that those of you thinking about bidding will take the time to read this solicitation carefully and understand what it means to be an energy services provider. Please keep these things in mind:

- Federal law requires that selected providers must be either nonprofits or local government organizations. However we encourage such organizations to enter into joint partnerships or sub-contract relationships with the utilities serving targeted areas, whether or not those utilities are public or investor owned.
- Being an energy service provider for the low-income community is a long-term commitment. Most of our providers have provided services for over 40 years. New Local Agency Providers identified through this procurement and who are successful in completing ARRA funded projects, will be considered for future CSD program grants.
- Being an energy service provider for the low-income community involves much more than just weatherizing homes.
- Providers assess the needs of the local low-income community, engaging key stakeholders (like elected officials, community organizations and the business community) to provide input into program development and direct the use of funds. In addition, providers perform outreach, energy education, budget counseling and coordinate services with other community organizations.
- ARRA funding is short term. The money currently available is to be expended by March 31, 2012. It is likely that after that time federal funding for weatherization services will return to more normal levels.
- CSD's Local Agency Providers must comply with applicable federal and state laws and regulations, and are subject to routine monitoring and auditing of program and financial activities and records. The selected provider must be able to demonstrate its fiduciary responsibility to meet these expectations.

If your business offers weatherization services or products and you are either not eligible or not set up to handle the demands of becoming a service provider to serve the low-income community, CSD strongly encourages you to consider subcontracting with existing or similar non-profit providers to offer your goods and services. All of our existing providers can be identified at our website: www.csd.ca.gov. (Go to the 'Programs' tab and look under the heading "Energy Assistance Programs.")

In addition, the State of California has many contracting opportunities available to large and small businesses. Visit the Department of General Services' eProcurement website at: www.eprocure.dgs.ca.gov to make sure you are taking advantage of all the opportunities available to you.

I. GENERAL INFORMATION

CONTACT INFORMATION

Send questions and comments regarding this RFA, via email, to: LGoddard@csd.ca.gov.

CSD'S PHYSICAL ADDRESS:

Department of Community Services and
Development
Energy and Environmental Services Division
2389 Gateway Oaks Drive
Sacramento, CA 95833-4245

CSD'S MAILING ADDRESS:

Department of Community Services and
Development
Energy and Environmental Services Division
P.O. Box 1947
Sacramento, CA 95812-1947

UPDATES, QUESTIONS AND ANSWERS

Throughout the bidding process, refer to CSD's website for any updates, amendments or the posting of questions and answers. Answers to all questions received by CSD regarding this bidding opportunity will be answered in writing and posted on the CSD website at: www.csd.ca.gov (look for the link under "What's New").

ANTICIPATED PROJECT TIMELINE

RFA released and advertised	December 31, 2010
CSD hosts Pre-bid Webinar or Bidder's Conference	January 11, 2011
Last Day for Questions	January 14, 2011
Proposals Due	January 28, 2011
CSD reviews proposals	January 31, 2011-February 21, 2011
Site Visits if Necessary	February 16-18, 2011
CSD posts Notice of Intent to Award	February 22, 2011
Contract Negotiation/ Preparation begins	February 24, 2011
Public Hearing	March 4, 2011
CSD awards agreements	March 7, 2011
Work begins for those with signed contracts	March 15, 2011

RFA OVERVIEW

Announcement

The State of California Department of Community Services and Development (CSD) announces the request for applications (2010-RFA-12) to select eligible entities to serve low-income households in not served and underserved areas of California. These areas and targeted ZIP Codes are listed in Attachment A.

This RFA focuses on expanded weatherization services funded through the American Recovery and Reinvestment Act of 2009 (ARRA).

Readers unfamiliar with CSD's weatherization and other programs can learn more about them in this document and at CSD's website: www.csd.ca.gov.

Clients to Be Served

The provider is responsible for identifying and serving targeted low-income households (especially those with elderly, young children and disabled individuals) and households which have the lowest incomes and the highest energy costs in relation to their income. The Contractor is responsible for determining income eligibility using federal and CSD eligibility standards. However the standards for eligibility determination, although thorough, are more streamlined than many other government programs targeting low-income households.

Area to Be Served

The existing network of CSD weatherization service contractors have been providing expanded services under the first phase of the ARRA Weatherization Assistance Program since July of 2009. This solicitation covers services to be delivered in areas of the state that currently are not be fully served by the existing network of local agency providers. These providers will continue to serve the areas through continuation of their initial Phase I grant, or through a partial allocation of the Phase II grant. The RFA opens up these areas for increased services by new providers using Phase II funds. Service territories are divided by ZIP Code. Please refer to Attachment A of this document for a list of areas and ZIP Codes to be served.

Eligible Entities

According to 10 Code of Federal Regulations, Section 440.15 eligible entities are Community Action Agencies (CAA) or other public or nonprofit entities.

Local agencies who hold current contracts in the targeted service areas will not be qualified for this procurement.

Subcontracting

A Contractor may "sub" some or all of the services required by their contracts. However the Contractor remains responsible to CSD for all performances under the contract.

Funding Source

Funding for these programs comes from the U.S. Department of Energy Weatherization Assistance Program (DOE WAP) as expanded by funding from the American Recovery and Reinvestment Act (ARRA).

Dollar Amount

Funding to all CSD energy services providers has jumped dramatically due to ARRA funding. ARRA has provided \$185 million to California for DOE WAP services. Of this \$ 66,555,000 has been allocated to CSD's existing network of service providers through September 30, 2010. The second phase of ARRA funding (\$80,456,000) became available for the 2010 Federal Fiscal Year, which began in October, 2010. CSD has conducted a process to allocate both unspent funds from the 2009 Federal Fiscal Year and the new allocation for the 2010 Federal Fiscal Year. Current CSD contractors who are successfully delivering services and meeting contract goals will be eligible for additional Phase II funding. It is estimated that approximately \$23,946,157 will be available from uncommitted Phase II funds for the underserved areas targeted through this RFA. See Attachment A for the projected availability of

funding for each targeted area.

Davis-Bacon Act Requirements

In order to fully maximize the impact of federal stimulus dollars, ARRA requires the service delivery personnel, whether employed directly by the Contractor or through a sub contractor, be paid the Davis-Bacon Act prevailing wages for similar work in the target areas. This is further detailed in Exhibit D of the Model DOE ARRA Contract.

Due to the complexity of this requirement, CSD will offer technical assistance to potential awardees during the negotiation phase and ongoing monitoring and assistance in meeting Davis-Bacon Act Requirements

Contract Budget

DOE WAP expenditures are tightly controlled by DOE and CSD. There are limits on the percentage of contract amounts that can be spent on administration (Not to exceed 5 % of Total), client education and counseling (Not to exceed 5% of Total), outreach (Not to exceed 5% of Total), training and technical assistance (Not to exceed a specified contract amount) and Health and Safety Activities (Not to exceed a formula driven amount*). There are also limits on the amount that can be spent on total services delivery per household. However the per household limit has been expanded greatly under ARRA, to \$6500.

* The formula for health and safety activities is: Total allocation, less administration, less allocation for training and technical assistance, less allocation for vehicles, times 25%.

Bidders will be asked to develop a program budget(s) based on the area or areas which they are proposing to serve. This budget is not final, but it will be comparatively evaluated and used as a basis for final negotiations of the Contract Budget.

A budget format, with instructions, is included as Attachment F of this document.

CSD's Right to Interview

CSD reserves the right to interview and/or perform site visits to top candidates in order to gather additional information needed to make a selection.

CSD's Right to Change

CSD reserves the right to modify, amend, cancel, or terminate this RFA at any time by issuance of an addendum posted to its web site at www.csd.ca.gov and at www.bidsync.com (eProcurement).

CSD reserves the right to fund some, none or all of the proposals submitted in response to this RFA. CSD reserves the right to both reduce the number of targeted areas proposed by a bidder and to request bidders with qualified proposals to expand into areas not covered by their proposal.

Applications Become Public Records

Upon execution of award, all documents submitted in response to the RFA will become the property of the State of California and will be regarded as public records under the California Public Records Act (Government Code Section 6250 et seq.) subject to review by the public.

II. BACKGROUND

STATEWIDE PROGRAM SUMMARY

About CSD

Community Services and Development (CSD) is a state department of the California Health and Human Services Agency.

CSD administers federal programs to help low-income families achieve and maintain self-sufficiency, meet their home energy needs, and reside in housing free from the dangers of lead hazards.

Local Agency Providers

CSD fulfills its mission by contracting with a network of more than 100 agencies throughout California that provide services and programs directly in their communities. These Local Agency Providers include both public and private, non-profit organizations.

Each year, CSD contracts with these providers and allocates their share of federal funds. In return, Local Agency Providers deliver services, then report regularly to CSD on how they spent their money. CSD can expand this network as necessary using procurement and negotiation processes.

CSD's Programs

This is brief overview of the programs CSD manages. All programs are carried out by Local Agency Providers:

CSBG – the Community Services Block Grant program funds a range of services to help low-income people attain the skills, knowledge, and motivation necessary to achieve self-sufficiency. The program also provides low-income people with immediate life necessities such as food, shelter, and health care, among other things. In addition, services are provided locally for the revitalization of low-income communities, the reduction of poverty, and to help provider agencies improve and increase their capacity and develop community resources.

Lead-Based Paint Hazard Control – provides evaluation and remediation of lead-based paint hazards, developing lead-safe training resources, and building capacity for the CSD network of local agency providers to achieve self-sufficiency in delivering services in their communities.

Energy Assistance –the federally funded Low-Income Home Energy Assistance Program (LIHEAP) assists eligible households with energy bills and in offsetting heating and cooling costs. LIHEAP dollars also fund some weatherization and assist in times of emergency. LIHEAP is funded through the U.S. Department of Health and Human Services. A second energy program—the U.S. Department of Energy Weatherization Assistance Program (DOE WAP)—provides free weatherization and health and safety measures to qualified customers. It is the DOE weatherization program that has been greatly expanded through ARRA funding and is the focus of this RFA.

ENERGY SERVICES PROGRAM SUMMARY

The information presented here provides a very general overview of some of the ongoing tasks an energy services provider may perform and some of the program requirements. However this solicitation is limited to ARRA Weatherization Program services. For a more complete understanding of the contractual obligations of ARRA Weatherization Program, potential bidders are strongly encouraged to review the Model DOE ARRA contract and its Attachments. (Attachment D of this document.)

Energy Assistance Programs

CSD receives funding for three energy-related programs. The funding for these programs comes from two federal agencies: DOE (the Department of Energy) and DHHS (the Department of Health and Human Services). The programs are described, briefly, below.

1. **HELP PAYING UTILITY BILLS** – Under HEAP (the Home Energy Assistance Program), contractors help eligible clients pay a utility bill. After performing intake and screening to ensure eligibility, contractors work directly with the utility company to ensure payment. The HEAP program is typically the client's first introduction to the energy services available to them, and once the bill is paid, contractors are responsible for providing energy education, weatherization, etc., to help clients reduce their monthly energy use and energy costs. (DHHS funded)
2. **ENERGY CRISIS INTERVENTION/FAST TRACK** – One component of the HEAP program described above is the Energy Crisis Intervention Program and Fast Track (ECIP/FT). ECIP/FT provides financial assistance to eligible households that are in a crisis situation. Examples include a household that has received a disconnect notice or one that has an energy-related crisis where the disruption could be life-threatening. As with HEAP, once the emergency is resolved, the contractor is responsible for performing all contracted services to help households reduce energy use and cost. (DHHS funded)

There is an additional emergency program intended to address heating and cooling needs of eligible households during cases of declared natural disasters. The program is called SWEATS (Severe Weather Energy Assistance and Transportation Services). For example, the contractor may provide transportation to and from heating and cooling centers or may provide blankets, portable heaters or fans. (DHHS funded)

3. **WEATHERIZATION** – Weatherization funding is provided by both DOE and DHHS. The majority of funding has traditionally come from DHHS via LIHEAP, but this balance has changed recently with the introduction of ARRA funding. At least for the next year and a half, a majority of weatherization money will come from DOE. Typical weatherization services provided under these contracts include: attic insulation, caulking, water heater blankets, heating/cooling system repair, and other conservation measures. And though the program is entitled "Weatherization," contractors are also required to perform a number of health and safety-related audits on energy-related equipment and appliances, checking for carbon monoxide or electrical hazards. Deficient equipment is repaired or replaced by the contractor, under the terms of the contract. The focus of this RFA

is Weatherization, as funded through DOE ARRA funds. See the Model DOE ARRA contact for greater detail.

CSD employs two private contractors to assist CSD and local agency providers for DHHS and DOE funded weatherization programs. One provides training on weatherization services procedures and techniques. This contractor also provides technical assistance and research to assure that the latest weatherization standards will be in play. The other contractor provides ongoing quality assurance inspections of weatherization services providers at the local agency through file reviews and through field testing of a cross sample of weatherized dwellings.

**Energy Clients
Served Statewide**

With the addition of ARRA funding, Local Service Providers have served 17,100 households through September, 2010.

Subcontracting

Contractor may subcontract some or all of the services required by their contracts to subcontractors that meet DOE and CSD requirements.

Required Reporting

Organizations receiving DOE funds are required to submit regular reports to CSD, including separate tracking of ARRA funds. Proposers should review the required reports, which can be located in the Model DOE ARRA Contract and its Exhibits. Attachment E of this document has listing of the main reports.

In addition to these reports, CSD may require other reports from time to time or implement new reporting requirements.

Transparency

The ARRA program places great emphasis on “transparency,” and all information and reports will be made available to the public, both at CSD’s website and on the provider’s website.

Providers will be required to post information and reports on its local website, including such information as: local plans, information on how to apply for and receive services, procurement and contracting policies and opportunities, and accomplishments (number of dwellings weatherized, etc.).

Required Licenses

Contractors that are non-profit organizations and performing Weatherization services must have a class B (General Building Contractor) license. For certain Weatherization tasks, a C-10 (Electrical) license may also be required.

Client Outreach

The contractor must ensure outreach to *all* eligible populations in the area it serves. This outreach often requires providing outreach information in multiple languages and/or traveling to remote locations in the service territory. Due to the limited time period for ARRA funding, the ability to do outreach is a critical factor for performance under the contracts.

Prioritizing Clients

Because the demand for services has traditionally been much higher than the available funding, CSD has required weatherization contractors to prioritize which households receive services. The highest level of assistance is furnished to those households which have the lowest incomes and the highest energy costs or needs in relation to income. Priority is given to households with vulnerable populations: children

under nineteen, disabled and those with members 60 and older. With the large increase in funding provided through ARRA, the contractor will need to balance the need for serving a larger low income community, while assuring that prioritized clients will still be served. The contractor's approach to this prioritization is specified annually in its required "Local Plan."

**Experience and
Qualifications**

What does it take to be an effective energy services provider? CSD has listed some of necessary experience and qualifications below. During this RFA process, you will be asked to show evidence of your organization's experience and qualifications as they relate to the following items.

- Experience serving low-income populations and doing eligibility determination for programs targeted to low-income populations
- Methods of data gathering and using data to set goals
- Physical presence in the community being served or ability to establish such presence
- Proximity to public transportation to existing or planned locations
- Ability to provide year-round services
- Ability to handle a high volume of telephone calls efficiently and courteously
- Ability to handle walk-in clients efficiently and courteously
- Ability to effectively market and outreach to low-income customers
- Ability to provide outreach and services in the written and spoken languages of eligible clients
- Ability to provide effective client education to assist clients in the reduction of energy use and energy costs
- Ability to provide budget counseling
- Ability to coordinate with local utility companies
- Existing relationships with other organizations that provide services to low-income individuals
- Additional sources of funding to leverage DOE funds
- Experience managing state and federal grant funds
- Ability to establish and maintain a system of internal accounting and administrative control
- Ability to show documented fiscal responsibility
- Technology to support required Web-based reporting
- Evidence of submitting timely reports
- Ability to perform energy audits; knowledge of Low Income Energy Efficiency (LIEE) audits
- Significant weatherization experience
- Construction-related experience
- Existing capital: trucks, tools, etc.
- Ability to inspect work performed
- Appropriate insurance and licenses
- Knowledge of applicable building codes
- Knowledge of local building permitting processes
- Ability to mobilize quickly in case of energy-related emergencies
- If subcontractors are used, documented experience ensuring quality of work performed by subcontractors

III. WHAT TO SUBMIT

	Minimum Required Content	Maximum Possible Points
<i>You must address each of the items listed in the "Minimum Required Content" column. If you do not have experience with a particular item, make a note of that in your application. You may add additional information that is not listed under the Minimum Required Content.</i>		
Item 1: Cover Letter	<p>Submit a brief cover letter. The letter must have the original signature of a person authorized to sign for your organization, and reference the RFA #: 2010-RFA-12. If the proposal is being submitted as a joint venture, submit a letter from each agency.</p> <p>Identify the specific targeted areas for which you are submitting an application.</p>	n/a
Item 2: Overall Approach	<p>Introduce your application to CSD. Let us know your history, your philosophy, your strengths and how and why you serve low-income communities. Tell us how long your organization has been providing services to the low-income community.</p> <p>Think of this as an introductory statement, a chance to tell us how your organization can help CSD fulfill its mission.</p>	5
Item 3: Organizational Structure	<p>Explain your organizational structure and how you intend to carry out the duties required by this contract. Discuss:</p> <ul style="list-style-type: none"> ▪ Your organization's internal resources and how they will contribute to contract fulfillment ▪ If you plan to use subcontractors and, if so, in what role ▪ How you will incorporate other community partners ▪ List the organizations (or types of organizations) who will participate in carrying out the duties required by this contract. Include the following: <ul style="list-style-type: none"> ○ Organization name or type of organization (note that because this contract will be funded with federal money, you cannot commit to any private contractor before going through a competitive bid process in accordance with 10 CFR Part 600.236 (Subpart C) for State and Local Government entities or 10 CFR Part 600.140 et seq (Subpart B) for Non-profit organizations) ○ Primary duties to be performed by the organization ▪ Provide an organizational chart that shows all the organizations listed above and the reporting relationships ▪ For those public or nonprofit organizations with whom you have or plan to implement a working relationship and for those private contractors with whom you have an existing, competitively bid contract, provide written commitments. These commitments may take the form of a letter, an MOU, a contract, etc. The commitment document must: <ul style="list-style-type: none"> ○ Be signed by an individual authorized to make such a commitment for that organization ○ State explicitly that the partner intends to perform the role and primary duties listed above 	15

	<ul style="list-style-type: none"> ○ Include enough detail to let CSD know that the partner is fully committed to participating to the level discussed in the proposal 	
Item 4: Experience with low-income communities and programs	<p>Describe your experience serving the low-income community. At a minimum, address the following:</p> <ul style="list-style-type: none"> ▪ Your organization's mission (whether formal or informal) to serve the low-income. What is your approach and your desired outcome? ▪ For each program you currently offer, or have offered in the past three years, to assist low-income individuals, list the following: <ul style="list-style-type: none"> ○ program name ○ program origination date ○ program purpose ○ funding source ○ annual funding amount ○ target populations served ○ number of clients served annually ○ status of program or reason for program termination ○ summary of any findings or recommendations <p>Describe your ability to leverage DOE ARRA funds with other related and available program funds.</p>	20
Item 5: Experience providing customer service	<ul style="list-style-type: none"> ▪ Describe how you have provided effective customer service to the local, low-income community. At a minimum, address the following: <ul style="list-style-type: none"> ○ Do you have a physical presence in the local community? If so, state the address(es) and describe the facility(ies). ○ If you have a physical presence, how far is it from public transportation? ○ If/how you provide year-round services ○ The quantity of phone calls received annually ○ The number of walk-in clients you have annually ○ How you ensure customers are treated efficiently and courteously ○ If you do not currently have a physical presence in the targeted areas, tell us how you plan to establish this presence. 	10
Item 6: Experience marketing to low-income communities	<p>Describe how you market to and serve low-income communities. At a minimum, address the following:</p> <ul style="list-style-type: none"> ○ Your approach to marketing to the low-income community. ○ How do you perform marketing/outreach to individuals who do not speak English or who speak limited English? ○ How do you provide services and education to individuals who do not speak English or who speak limited English? ○ Describe if/how you have provided client education, especially education to help clients reduce energy use and energy costs ○ Describe if/how you have provided budget counseling 	10

	or equivalent	
Item 7: Relationship Building	<p>Describe your current relationships with other organizations that serve low-income communities, including the local community action agency at your present location. At a minimum, address the following:</p> <ul style="list-style-type: none"> ○ List organizations—including utility companies—that serve low-income communities and with whom you have a relationship. Include: <ul style="list-style-type: none"> ▪ Name of organization ▪ Organization contact person and phone number ▪ Nature of the relationship and how it benefits the low-income community <p>If your agency is not currently serving the areas you are targeting through your proposal, tell us how you plan to establish such relationships and what, if any, target area organizations with which you have an existing relationship, or have contacted as part of this procurement.</p>	10
Item 8: Experience administering programs	<p>Describe your experience with accounting and administration. At a minimum, address the following:</p> <ul style="list-style-type: none"> ▪ Experience managing federal grant funds ▪ Ability to establish and maintain a system of internal accounting and administrative control ▪ Any loss of public or private funding for failure to meet grant or contract requirements <p><i>Please note that under Item 16 below, Required Documents, you will be submitting a number of documents to support your financial strength and accountability.</i></p>	15
Item 9: Weatherization Experience	<ul style="list-style-type: none"> ▪ Describe your technical experience. At a minimum, address the following: <ul style="list-style-type: none"> ○ Number of energy audits performed annually, including a description of a typical audit ○ Experience with the Low Income Energy Efficiency (LIEE) program ○ Other weatherization experience ○ Construction-related experience • Describe your existing resources relating to the performance of weatherization. List and quantify: <ul style="list-style-type: none"> ○ # trucks ○ # blower doors ○ # Carbon Monoxide (CO) testers ○ # duct blasters ○ Miscellaneous equipment ▪ State whether or not you hold the following insurances and licenses. If so, state details, such as who holds a particular license, license numbers, insurance company names, etc. If not, state your plan to obtain that license or insurance. <ul style="list-style-type: none"> ○ CSLB (Contractor's State License Board) General Building Contractor license, Category B ○ CSLB Electrical Contractor license, Category C-10 	40

	<ul style="list-style-type: none"> ○ Other CSLB licenses ○ Fidelity bond ○ Worker's compensation insurance ○ General liability insurance ○ Vehicle insurance <ul style="list-style-type: none"> ▪ Describe your experience with and knowledge of the following codes and regulations. Be specific: give examples of projects where these codes and regulations were used and how they were used. <ul style="list-style-type: none"> ○ Title 24 of the California Code of Regulations (Building Codes) ○ EPA (Federal Environmental Protection Agency) and HUD (Federal Housing and Urban Development) regulations regarding lead ○ DHHS (Federal Department of Health and Human Services) regulations regarding Weatherization procurement ○ Building codes ○ Local building codes and permitting ▪ Describe how your organization inspects weatherization or construction-related work. 	
Item 10: Ability to Mobilize	Describe your ability to mobilize quickly in case of an emergency, especially an energy-related one. Give a specific example(s) of how you have successfully mobilized to address an emergency.	10
Item 11: Quality Control	<ul style="list-style-type: none"> ▪ Describe how you ensure quality control for weatherization and/or other, construction-related projects: <ul style="list-style-type: none"> ○ How do you ensure internal quality control? ○ If you use subcontractors, how do you ensure quality control of their work? 	10
Item 12: Staff and Duties	<ul style="list-style-type: none"> ▪ List all KEY staff responsible for carrying out the duties required by this contract. Include appropriate staff from the organizations listed in Item 3. <p>For each staff member listed, provide the following: <i>(Note: if the individual will be a new hire, state "new hire" where "name" is requested, and complete the remaining information based on the individual's proposed job description).</i></p> <ul style="list-style-type: none"> ○ Name ○ Name of organization ○ Job Title ○ Key Duties as they relate to this contract ○ Percentage of time they will perform those duties for CSD ○ Spoken or written language fluency, other than English <ul style="list-style-type: none"> ▪ For each key staff member listed above, include a resume—not to exceed one, double-sided page. 	20
Item 13: Budget Planning	Submit a draft budget for each of the targeted areas for which you are proposing to service. Complete a CSD 570, 2009 ARRA DOE Weatherization Budget, for each area covered and provide	20

	a narrative explaining the major components and how you arrived at the line item costs. The Budget will be evaluated to help determine the cost-effectiveness of the proposal and used as a starting point for negotiating a final contract budget if your agency is selected for a potential award.	
Item 14: Work Plan	Instructions for completing the Work Plan are contained in Attachment B	30
Item 15: Letters of Support	Submit five letters of support and recommendation from individuals or organizations you feel can best speak to your qualifications as a provider of services to the low-income community.	5
Item 16: Required Documents	<p>The forms and documents listed below must be submitted with your proposal.</p> <ul style="list-style-type: none"> ▪ <i>Documentation of current IRS tax-exempt status</i> (not required for public agencies) ▪ <i>Latest IRS Form 990, Return of Organizations Exempt from Income Tax</i>, (not required for public agencies) ▪ <i>Articles of Incorporation</i> (not required for public agencies) ▪ <i>An Agency Audit</i>, conducted within the past two years, including management letter and agency response. The audit must have been conducted in compliance with standards adopted by the American Institute of Certified Public Accountants, including Government Auditing Standards (not required for public agencies). ▪ <i>Conflict of Interest Statement</i> - (See Attachment G for specific instructions). ▪ <i>Disclosure of Legal Proceedings</i> – List any and all legal proceedings your organization is involved in and the current status of those legal proceedings. If the organization has no legal proceedings to disclose, submit a statement to that fact with a date, and the signature of an individual authorized to sign for the organization. 	Will be used in scoring Item 8

IV. EVALUATION CRITERIA

Each application will be scored in three phases, as described below. Each proposal must be received by CSD by the due date and time. Proposals received after that date and time will not be accepted and will not be scored. The summary score sheet to be used by CSD is included in the Attachments section of this document.

Phase 1: Basic Documents

CSD will confirm receipt of the basic documents listed below. If applicant fails to submit these documents by the due date, the proposal will be considered nonresponsive and will not continue to Phase 2 scoring.

- 1) An original application and five copies
- 2) A cover letter with the signature of a person authorized to sign for the organization
- 3) All required documents listed in Item 16 of What to Submit.

Phase 2: Proposal Evaluation

Each proposal will be scored by multiple reviewers, first individually, then collaboratively. The exact number of reviewers has not been determined at this time but will be no less than three and no more than five. Reviewers will be individuals familiar with CSD's work and the goals and objectives of the federal programs they administer.

Reviewers will review each proposal and assign a point value, ranging from 0 to the number of "Maximum Points" allowed, to each of the scored items. After discussion within the evaluation panel, individual Item scores will be added to arrive at each proposal's Total Phase 2 Points.

The points awarded by each reviewer will be averaged, based on the number of reviewers. The results of that averaging will be the Final Phase 2 Score.

Total Points Possible		
Item No.	Item	Maximum Points
1	Cover Letter with Original Signature	n/a
2	Overall Approach	5
3	Organizational Structure	15
4	Experience with Low-Income Communities and Programs	20
5	Experience Providing Customer Service	10
6	Experience Marketing to Low-Income Communities	10
7	Relationship Building and Maintenance	10
8	Experience Administering Programs	15
9	Weatherization Experience	40
10	Ability to Mobilize	10
11	Quality Control	10
12	Staff and Duties	20
13	Budget Planning	20
14	Work Plan	30

15	Letters of Support	5
16	Required Documents	n/a
Total Phase 2 Points Possible		220

Phase 3: Optional Interviews

CSD reserves the right to interview and conduct sight visits for top potential candidates in order to gather additional information needed to make a selection. This would occur prior to the award recommendation.

V. WHAT, HOW AND WHEN TO SUBMIT

WHAT	HOW	NO LATER THAN...
<p>Notice of Intent to Participate in Pre-bid Webinar or Bidder's Conference: Send name of organization, number of participants and their email addresses.</p> <p>This notice is optional, but greatly appreciated, as it will help CSD plan for the number of attendees.</p>	<p>Via email to LGoddard@csd.ca.gov</p>	<p>January 10, 2011</p>
<p>Notice of Intent to Submit Bid: State organization name and your intent to submit an application.</p> <p>This notice is optional, but greatly appreciated, as it will help CSD plan for the review process.</p>	<p>Via email to LGoddard@csd.ca.gov</p>	<p>January 24, 2011</p>
<p>Final Application</p> <p>Submit an original and five copies of the proposal.</p> <p>The original should be marked "original" and contain an original signature on the cover letter of a person authorized to sign for your organization.</p>	<p>Proposals can be hand-delivered or mailed. If mailed, they must arrive in CSD's office by the due date and time.</p> <p>Applications arriving in CSD's office after the due date and time will not be accepted.</p> <p><i>If mailed, mail to:</i> Department of Community Services and Development Energy and Environmental Services Division P.O. Box 1947 Sacramento, CA 95812-1947</p> <p><i>If hand-delivered, deliver to:</i> Department of Community Services and Development Energy and Environmental Services Division 2389 Gateway Oaks Drive Sacramento, CA 95833</p>	<p>Completed proposals are due</p> <p>Friday, January 28, 2011 no later than 5 p.m.</p> <p>Applications must be in CSD's office no later than this time and date.</p>

V. WHAT, HOW AND WHEN TO SUBMIT - *continued*

This RFA requires the submission of 16 distinct items, described in Section 3, “What to Submit.” When submitting your proposal, please use tabs or dividers labeled 1 – 16 to separate the 16 required items.

VI. PUBLIC HEARING

Notice of the proposed award shall be posted in a public place in the office of the Department of Community Services and Development, 2389 Gateway Oaks Drive, Sacramento, CA 95833 and on the following Internet site: www.csd.ca.gov ten (10) days prior to the public hearing. Public comments on the awards and the addition of any new Local Service Providers resulting from this procurement will be heard by CDS at the Public Hearing scheduled for 10 days after the public posting. CSD will take any comments resulting from the Public Hearing into account before making final awards. All decisions on the awards are final and not subject to a former appeals process.

VII. FINAL AWARD PROCESS

After the Public Hearing, CSD will notify each winning contractor of the award of the agreement. The Contractor must complete and submit to the awarding agency the Payee Data Record (STD 204) to determine if the contractor is subject to state income tax withholding pursuant to California Revenue and Taxation Code Sections 18662 and 26131. This form can be found on the Internet at www.osp.dgs.ca.gov under the heading Forms Management Center. No payment shall be made unless a completed STD 204 has been returned to the awarding agency.

The Contractor must also sign and submit to the awarding agency, page one (1) of the Contractor Certification Clauses (CCC), which can be found on the Internet at www.dgs.ca.gov/contracts.

CSD will enter into final negotiations with the winning Contractors to further clarify any of the contract requirements and to negotiate a final contract budget. A final contract will be prepared and 4 copies sent by CSD for the appropriate signatures and approvals.

Due to the limited project time, potential contractors are strongly encouraged to pre-schedule any meetings of non-profit agency or public boards necessary to approve the award or contract in order for project ramp up to begin on March 15, 2011. No services can be delivered or reimbursed until CSD has received a signed and fully approved contract.

ATTACHMENTS

- A. Targeted Areas and ZIP Codes to be Served/ Projected Available Funds
- B. Work Plan Instructions
- C. Scoring Summary
- D. Model DOE ARRA Contract (<http://www.csd.ca.gov/Contractors/ENERGY/Energy.aspx>)
- E. List of Required Reports
- F. CSD 570 ARRA DOE Weatherization Budget and Instructions
- G. Conflict of Interest Statement Instructions

Attachment A: Targeted Areas and ZIP Codes to be Served/ Projected Available Funds

The projected dollar amounts are estimated and subject to change.

The final allocation for each contract will be determined through the RFA evaluation process and post award budget negotiations.

Alameda County Area A:

Projected Available Funds: \$369,869

ZIP CODES: All ZIP Codes in Albany, Berkeley and Emeryville.

Alameda County Area B:

Projected Available Funds: \$2,043,199

ZIP Codes: All Remaining ZIP Codes in Alameda County (Without Albany, Berkeley and Emeryville).

Inyo and Mono Counties:

Projected Available Funds: \$355,855

Zip Codes: All

Los Angeles County Area A:

Projected Available Funds: \$3,883,500

ZIP Codes:

AREA A	AREA A
90020	91201-08
90024-29	91210
90036	91301-09
90038-39	91311-13
90046	91316
90048-49	91324-28
90064	91331-37
90066-69	91340-46
90077	91352-53
90094	91356-57
90203	91361-62
90209-13	91364-67
90231	91372
90233	91376
90263-65	91392-96
90272	91401-13
90290	91416
90292	91423
90294-96	91426-36
90401	91501-2
90402-04	91504-05
90405	91506
90406-11	91521-23
91040-43	91601-10
	91614-17

Los Angeles County Areas B & D:

Projected Available Funds: \$11,444,568

ZIP Codes:

AREA B	AREA B	AREA B	AREA D	AREA D	AREA D	AREA D	AREA D
90004-05	91023-25	93534-36	91702	91792	90660	90713	90831
90010	91030-31	93539	91706	91793	90661	90714	90832
90016	91046	93543-44	91711	90239	90662	90715	90833
90018-19	91066-77	93550-53	91722	90240	90670	90716	90834
90022-23	91101-18	93563	91723	90241	90671	90717	90835
90026	91209	93584-86	91724	90242	90702	90731	90840
90031-33	91214	93590-91	91731	90255	90706	90732	90842
90034-35	91221-22		91732	90262	90707	90733	90844
90040-42	91224-26		91733	90280	91714	90734	90845
90056	91310		91740	90601	91715	90744	90846
90058	91321-22		91741	90602	91716	90755	90847
90063	91350-51		91748	90603	91734	90801	90848
90065	91354-55		91750	90604	91744	90802	90853
90201-02	91380-87		91765	90605	91745	90803	
90230	91390		91766	90606	91746	90804	
90232	91503		91767	90607	91747	90805	
90270	91507-08		91768	90608	91749	90806	
90291	91510		91769	90609	90274	90807	
90293	91555		91770	90610	90275	90808	
90640	91754-55		91773	90631	90701	90809	
91001-03	91775-78		91780	90637	90703	90810	
91006-07	91801-99		91788	90638	90704	90813	
91009-12	93243		91789	90650	90710	90814	
91016-17	93510		91790	90651	90711	90815	
91020-21	93532		91791	90652	90712	90822-23	

Mariposa County:

Projected Available Funds: \$152,891

ZIP Codes: All

San Diego County:

Projected Available Funds: \$1,306,002

ZIP Codes:

SAN DIEGO

91901	92014
91902	92017
91903	92019
91905	92020
91906	92021
91910	92022
91911	92040
91912	92053
91913	92066
91914	92071
91915	92113
91916	92114
91917	92125
91931	92135
91934	92139
91935	91932
91947	92153
91948	92154
91950	92173
91962	
91963	
91977	
91978	
91979	
91980	

San Joaquin County:

Projected Available Funds: \$1,104,089

ZIP Codes: All

Santa Clara County:

Projected Available Funds: \$2,211,102

ZIP Codes: All

Ventura County:

Projected Available Funds: \$1,048,112

ZIP Codes: All

Attachment B: Work Plan Instructions (Item 14)

In 10 pages or less, prepare a work plan for all targeted areas for which you are competing that specifically addresses the items listed below. The intent of this work plan is to show CSD how you will address and implement some important aspects of the program. Feel free to include any graphics, charts or graphs, or additional discussion that will help CSD understand your approach to meeting your contractual obligations.

Start-Up

Describe the steps you will take to prepare your organization to implement the responsibilities of a CSD weatherization contract. Include the following:

- What are your organization's strengths in preparing to implement the program?
- What are your organization's weaknesses in preparing to implement the program?
- When will your organization be ready to begin to fulfill your obligations under the contracts?
- Describe a fully-staffed organization: what job classifications will you employ and how many?
- Describe how you will build, or build upon, the local alliances necessary for the success of the project.
- Describe how you will collect and use data to ensure your program services are reaching the most vulnerable populations in your county.

Marketing and Outreach

The contractor must ensure outreach to all eligible populations in the area it serves. Given the short remaining duration of ARRA weatherization funding, outreach must ramp up early in the project, and remain at full strength throughout. This outreach often requires providing outreach information in multiple languages and/or traveling to remote locations in the service territory. Discuss, at a minimum:

- The barriers you perceive to reaching eligible households in the defined territory.
- How your organization will overcome these barriers.
- Specific examples of how your agency will market services available through this project. For each example, explain why you recommend this marketing approach.

Intake/Prioritization

Under the DOE ARRA project contracts, the contractor must ensure that the highest level of assistance is furnished to those households that have the lowest incomes and the highest energy costs or needs in relation to income. Priority is given to households with vulnerable populations: Children under five, disabled and household members 60 and older. However the limited time opportunity provided by ARRA funding will allow for a broader distribution of services to low income households. Discuss, at a minimum:

- How individuals will apply to your organization to receive services under your CSD contracts. Address such issues as whether applications will be accepted on a walk-in basis during regular business hours, by phone, etc.
- How you will prioritize applications to achieve a balance between the need to serve the most vulnerable populations, with the need to assure that a maximal number of low income clients can be served during the window of opportunity that ARRA funding provides.

- Agencies are required to service clients throughout the year, which means funding must last the entire year. How will you prioritize applications to ensure that funds are available throughout the year to serve clients, especially the vulnerable populations?

Weatherization

Describe how you will implement a weatherization program. Discuss, at a minimum:

- Your start-up timeline and process for implementing a weatherization program, including equipment purchases, hiring, training, etc. Indicate when you will be fully staffed, trained and ready to begin weatherization.
- Whether you intend to perform weatherization with in-house staff or subcontractors and why.
- If you intend to perform weatherization in-house, a list of major equipment and vehicles you intend to purchase for that purpose.
- What you consider to be an effective energy audit, both in terms of cost and process.
- What things you would consider before deciding which energy efficiency measures to install.
- What approach you would use to educate clients about energy efficiency.

Attachment C: RFA for ARRA Energy Services

ORGANIZATION:

☐ NON-PROFIT ☐ PUBLIC

WAS APPLICATION RECEIVED IN THE CSD OFFICE NO LATER THAN JANUARY 28, 2011 AT 5 P.M.

☐ YES ☐ NO

PHASE 1: BASIC DOCUMENTS

DID APPLICANT SUBMIT AN ORIGINAL APPLICATION AND FIVE COPIES?

☐ YES ☐ NO

DOES THE ORIGINAL APPLICATION CONTAIN A COVER LETTER WITH THE ORIGINAL SIGNATURE OF A PERSON AUTHORIZED TO SIGN FOR THE ORGANIZATION?

☐ YES ☐ NO

DOES THE APPLICATION CONTAIN THE FOLLOWING REQUIRED FORMS? (ITEMS MARKED WITH AN “**” ARE NOT APPLICABLE FOR PUBLIC AGENCIES.)

DOCUMENTATION OF IRS TAX-EXEMPT STATUS*

☐ YES ☐ NO ☐ N/A

AGENCY AUDIT*

☐ YES ☐ NO ☐ N/A

FORM 990*

☐ YES ☐ NO ☐ N/A

CONFLICT OF INTEREST STATEMENTS

☐ YES ☐ NO

ARTICLES OF INCORPORATION*

☐ YES ☐ NO ☐ N/A

DISCLOSURE OF LEGAL PROCEEDINGS

☐ YES ☐ NO

ALL QUESTIONS MUST BE ANSWERED “YES” (OR N/A FOR PUBLIC AGENCIES) TO RECEIVE A SCORE OF “PASS.” IF “FAIL,” THEN STOP. DO NOT SCORE PHASE 2.

☐ PASS ☐ FAIL

Phase 1 Reviewed by:

Date:

PHASE 2: PROPOSAL SCORING (ATTACH DETAILED PHASE 2 SCORING DOCUMENT.)

ITEM No.	ITEM	POINTS ASSIGNED
1	COVER LETTER WITH ORIGINAL SIGNATURE	n/a
2	OVERALL APPROACH	
3	ORGANIZATIONAL STRUCTURE	
4	EXPERIENCE WITH LOW-INCOME COMMUNITIES AND PROGRAMS	
5	EXPERIENCE PROVIDING CUSTOMER SERVICE	
6	EXPERIENCE MARKETING TO LOW-INCOME COMMUNITIES	
7	RELATIONSHIP BUILDING AND MAINTENANCE	
8	EXPERIENCE ADMINISTERING PROGRAMS	
9	WEATHERIZATION EXPERIENCE	
10	ABILITY TO MOBILIZE	
11	QUALITY CONTROL	
12	STAFF AND DUTIES	
13	BUDGET PLANNING	
14	WORK PLAN	
15	LETTERS OF SUPPORT	
16	REQUIRED DOCUMENTS	n/a
	TOTAL PHASE 2 POINTS	

Phase 2 Scored by:

Date:

Scorer's Organization:

Attachment D: Model ARRA Weatherization Contract

You can access this document on CSD's website.

Go to www.csd.ca.gov.

Look under the first column called "What's New."

Scroll down and click on "CSD seeks new Energy Services Provider in Not Served and Underserved Areas."

This will direct you to a page containing all the RFA documents.

Attachment E: List of Required Reports

The reporting requirements for the DOE ARRA Weatherization Assistance Program are extensive and thorough, but the reports really help CSD, the Local Service Providers and the Federal Government track the progress and impact of weatherization services and the overall accountability of the DOE ARRA WAP.

Monthly Expenditure Activity Reporting System (EARS) Report-See Model DOE ARRA Contract, Exhibit B

DOE Annual Training and Technical Assistance Report (Format CSD 524)-See Model DOE ARRA Contract, Exhibit B

DOE Annual Leveraging Report (Format CSD 523)-See Model DOE ARRA Contract, Exhibit B

Close-out Report (Due 90 days after expiration of the Contract) (Formats CSD 720, 720D and 720E –See Model DOE ARRA Contract, Exhibit B

Monthly Narrative Report on Ramp-up Activities (for the first three months of the Contract term)-See Model DOE ARRA Contract, Exhibit F, Programmatic Provisions: ARRA

DOE Quarterly Report (Format CSD 513) (Focus is on accomplishments, challenges and achievement of goals)-See Model DOE ARRA Contract, Exhibit F, Programmatic Provisions: ARRA

California ARRA Accountability Tool (CAAT) (Focus is on job creation and retention and feeds into a larger state-wide report to the Federal Government on the impact of ARRA funding)-See Model DOE ARRA Contract, Exhibit F, Programmatic Provisions: ARRA.

In addition to these reports, CSD may require other reports from time to time or implement new reporting requirements.

Attachment F: CSD 570 ARRA DOE Weatherization Budget and Instructions; to be completed for each region in which the agency is proposing to serve.

Attachment F
2009 ARRA DOE WAP WEATHERIZATION BUDGET

Contractor Name:		Contract Number: 09-	Telephone Number:
Class "B" Contractor's License No.:		Name on License:	Expiration Date:
Prepared By (Print Name/Title):		E-mail Address:	Fax Number:
10 - ADMINISTRATIVE BUDGET			
1.	Administrative Costs	\$	
2.	Administrative Equipment (More than \$5,000)		
3.	TOTAL ADMINISTRATIVE COSTS (Total of Lines 1 and 2 – Not to exceed allocated amount)	\$	
20 – WEATHERIZATION PROGRAM BUDGET			
1.	Client Education	\$	
2.	Liability Insurance		
3.	Outreach		
4.	Training and Technical Assistance (Not to exceed allocated amount)		
5.	Historic Preservation Reviews		
6.	Minor Vehicle and Field Equipment (Less than \$5,000)		
7.	Major Vehicle and Field Equipment (More than \$5,000)		
8.	Vehicle Insurance		
9.	Workers' Compensation		
10.	Intake		
11.	Direct Program Activities		
12.	Health & Safety (Not to exceed 25%)		
13.	General Operating Expenses		
14.	TOTAL PROGRAM COSTS (Total of Lines 1-13)	\$	
30 - TOTAL COSTS (Total of Lines 3 & 14)		\$	

ATTACHMENT F
INSTRUCTIONS
2009 DOE ARRA WEATHERIZATION PROGRAM BUDGET
CSD 570 (Rev. 12/17/10)

SECTION 10 – ADMINISTRATIVE COSTS

Line 1 – Administrative Costs - Enter the amount of funds allocated for all Administrative Costs. Administrative costs include salaries, wages, workers compensation, and fringe benefits for administrative staff, accounting, facilities, office equipment and supplies, telephone, travel, utilities and other administrative costs related to activities subject to DOE program rules.

Line 2 – Administrative Equipment - Enter the acquisition (actual cost to purchase) office equipment. These are purchases that are over \$5,000.

Line 3- Total Administrative Costs – Enter the total of lines 1 and 2. This amount should not exceed the allocated amount.

Note: In calculating the allowable administrative costs, any carryover funds allocated from a previous program year CANNOT be used in calculating the allowable administrative costs. Administrative costs are limited to funding only. Calculate the percentage of total Administrative Costs to the Contract Amount EXCLUDING ANY CARRYOVER AMOUNTS ALLOCATED TO YOUR AGENCY. The total of Administrative Costs is limited to five percent (5%) of the contract budget. (See CSD 574 to apply for additional administrative funds.)

SECTION 20 – PROGRAM COSTS

Line 1 – Client Education – Enter the amount of funds allocated for client education activities.

Line 2 - Liability Insurance - Enter the amount of funds allocated for insurance bonds, general liability and pollution occurrence insurance. Do not include vehicle insurance in accordance with DOE program rules.

Line 3 – Outreach – Enter the amount of funds allocated for Outreach.

Line 4 - Training and Technical Assistance - Enter the amount of funds allocated for training and technical assistance subject to DOE program rules. The funds allocated cannot exceed the amount as provided by CSD.

Line 5 – Historic Preservation Reviews – Enter the amount of funds budgeted for the aggregation, collection and reporting of dwelling characteristic information and proposed scope of weatherization measures/services to be performed.

Line 6 – Minor Vehicles and Field Equipment (Acquisition Costs) - Enter the acquisition (actual cost to purchase) vehicle and field equipment. These are purchases that are under \$5,000.

Line 7 – Major Vehicles and Field Equipment (Acquisition Costs) - Enter the acquisition (actual cost to purchase) vehicle and field equipment. These are purchases that are over \$5,000. Vehicle and field equipment purchases or lease purchase option with a value over \$5,000 need prior approval from CSD.

Line 8 – Vehicle Insurance – Enter the amount of funds allocated for insurance for weatherization vehicles.

Line 9 – Workers’ Compensation – Enter the amount of funds allocated for Workers’ Compensation for program staff. Do not include workers’ compensation for salaries allocated to administrative costs.

Line 10 – Intake – Enter the amount of funds allocated for Intake.

Line 11 – Direct Program Activities – Enter the amount of funds allocated for Direct Program Activities.

Line 12 – Health and Safety – Enter the amount of funds allocated for Health & Safety not to exceed 25%.

Line 13 – General/Operating Expenditures – Enter the amount of funds allocated for Operating Expenditures.

Line 14 - Total Program Costs - Enter the sum of Lines 1 through 13.

Note: The total Program Costs shall not be less than 95% of the total Contract Amount unless additional administrative funds have been applied for. (See CSD 574 to apply for additional administrative funds.)

SECTION 30 – TOTAL COSTS

Enter the sum of Lines 1 and 14. Verify the total allocation as provided by CSD.

Attachment G: Conflict of Interest Statement(s) Instructions

For the purpose of evaluation, all applicants are required to disclose any and all potential conflicts of interest. Certain conditions may render an applicant unable to give impartial, technically sound, objective assistance and advice, resulting in a biased work product or unfair advantage.

Applicant shall prohibit its officers, employees, partners or subcontractors from using their positions for a purpose that could result in private gain or that gives the appearance of being motivated for private gain for themselves or others, particularly those with whom they have family, business, or other ties.

In order to properly evaluate the applicant and avoid termination and/or controversy at a later stage, bidders must disclose any actual or potential conflicts of interest for any officer, employee, partner or subcontractor who may have any personal financial interest or benefit that either directly or indirectly arises from the agreement with CSD.

How to Submit Conflict of Interest Statements:

Provide a signed Conflict of Interest statement.

If the organization believes it has no actual or potential conflicts of interest, the statement should state that fact and be signed and dated by an individual authorized to sign for the organization.

If the organization believes that it does or may have an actual or potential conflict of interest, the statement should explain the conflict in as much detail as necessary and be signed and dated by an individual authorized to sign for the organization.

Completed Conflict of Interest Statements should be submitted with the "Required Documents" in Item 16.